

# iAPI v1.6.5

Cortex Tool

Applies to: iAPI | v1.6.5

Document Version: 1.1

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# Document Version Control

Version Number	Date	Description of Changes
1.0	January 18, 2021	Initial release of document.
1.1	February 3, 2021	<ul style="list-style-type: none"><li>• Updated <a href="#">Call API</a>.</li><li>• Updated <a href="#">Troubleshooting</a>.</li></ul>

## Scope and Audience

This document describes how to use iAPI. This document is intended for Cortex Administrators.

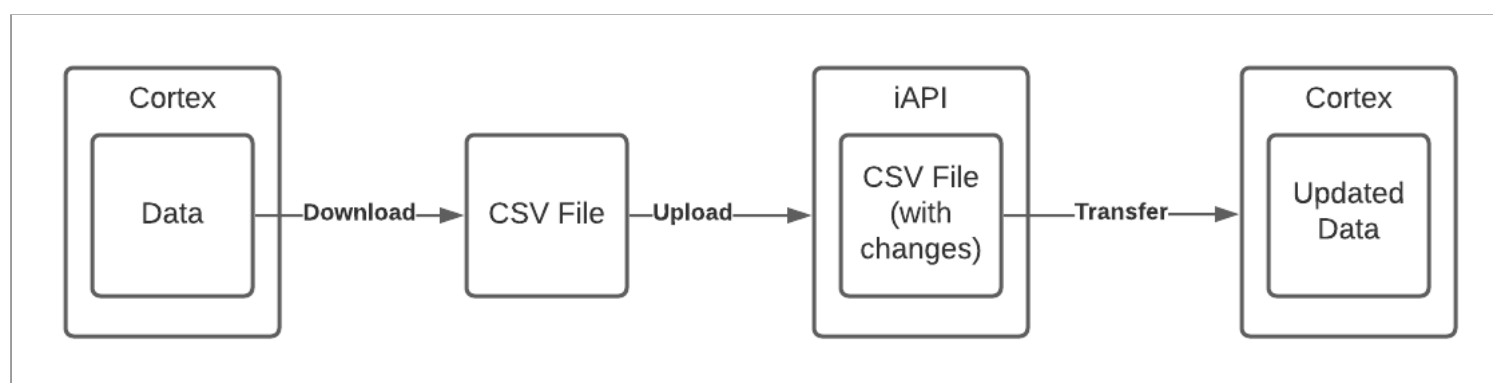
## Additional Resources

- [Cortex Developer's Guide](#)
- [Orange Logic - DataTable APIs v2.1](#)
- [Orange Logic - DataTable APIs v2.2](#)

## Overview

iAPI is a Windows desktop application created by Orange Logic to perform API calls to Cortex. iAPI allows you to upload CSV files to create, import, update, and delete metadata, Cortex users, and other Cortex database records. A standard iAPI workflow is:

1. You download a CSV of existing data records in Cortex.
2. You make changes to the CSV.
3. You upload that CSV to Cortex via iAPI.
4. iAPI updates the data in Cortex.



iAPI Workflow

iAPI is meant to handle large batches of data. For example, it is common for a CSV file to have over 50,000 rows of data to be ingested. You can use iAPI to ingest large CSV files of any size. However, spreadsheet applications, like Microsoft Excel, do not handle large files like this well when searching for a record, filtering by error type, etc. Therefore, if you need to analyze the Success and Failed Logs, we recommend that you split the data into separate CSV files of 50,000 rows each. This makes it easier to analyze the CSVs. The [CSV Splitter tool](#) makes it easy to split large CSVs into smaller ones.

A Log is created each time an API is called. These Logs contain information regarding the import status of the data sent via iAPI. If your CSV failed to import all changes you can review the Failed Log CSV, make revisions, and upload the modified Failed Log to try again, rather than running the entire call again.

## Requirements

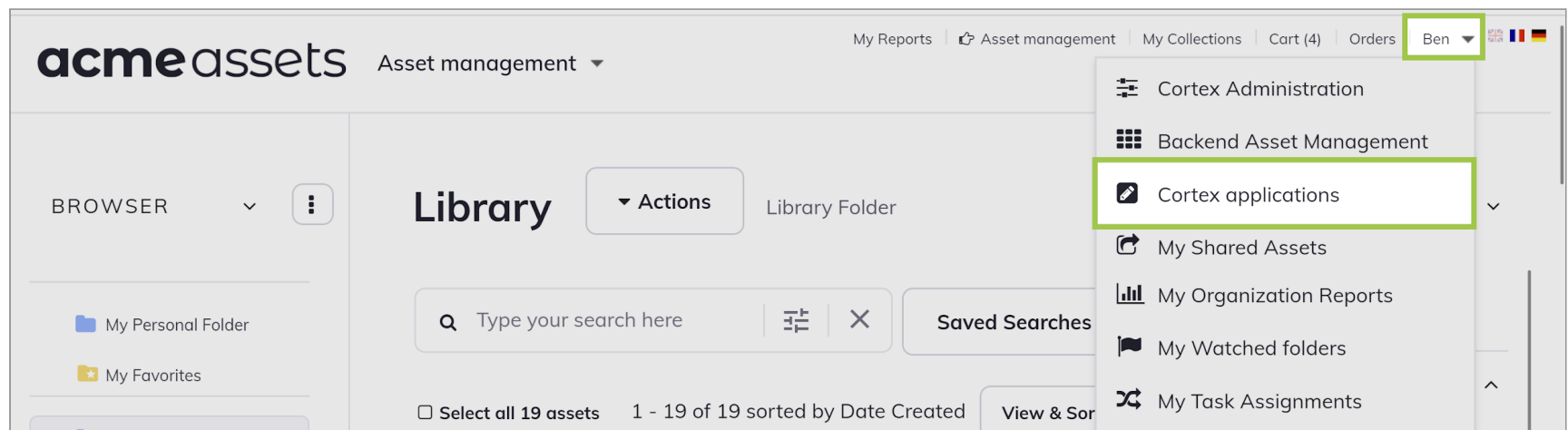
The system requirements for iAPI are:

- Windows 7 or later (Mac users must use a virtualized Windows environment, such as Parallels Desktop, VMware Fusion, or VirtualBox)
- [Microsoft Visual C++ Redistributable](#): 2013 or later and 64-bit or 86-bit
- Administrator rights

## Download and Install iAPI

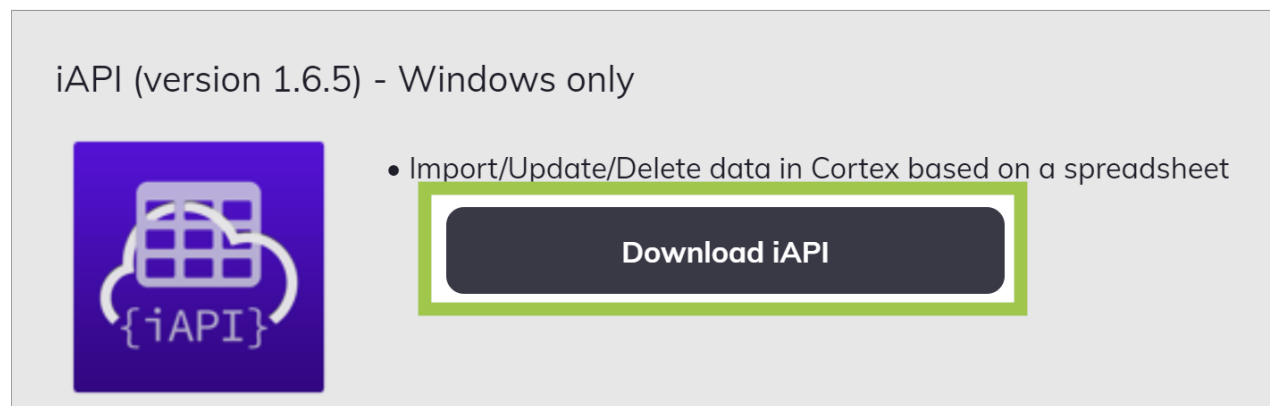
To download and install iAPI:

1. Log in to your Cortex site.
2. Click the **User Menu** and select **Cortex Applications** from the drop-down menu.



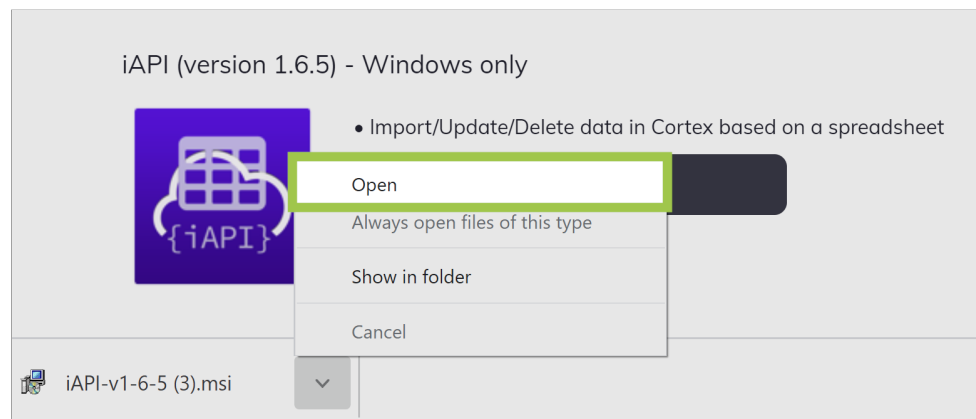
Cortex Applications in User Menu

3. Click **Download iAPI** in the **iAPI (Version) - Windows Only** section.



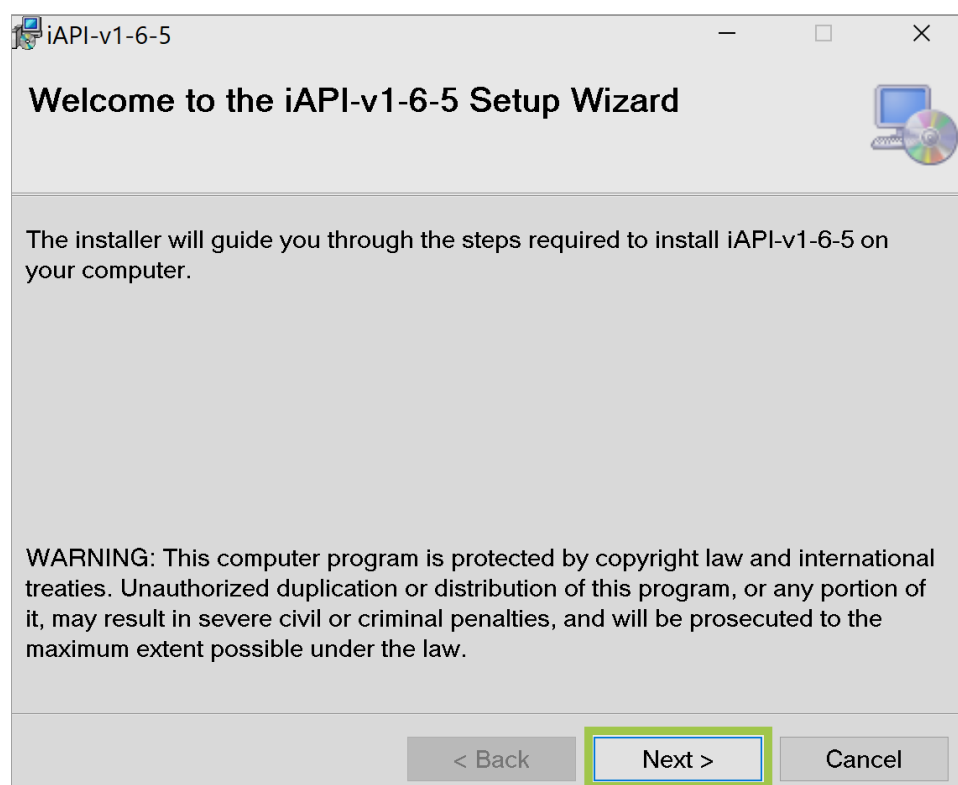
Download iAPI Button

4. The program automatically downloads. Open the file that displays at the bottom of the window. The **Welcome to the iAPI Setup Wizard** pop-up window displays.



Open iAPI File

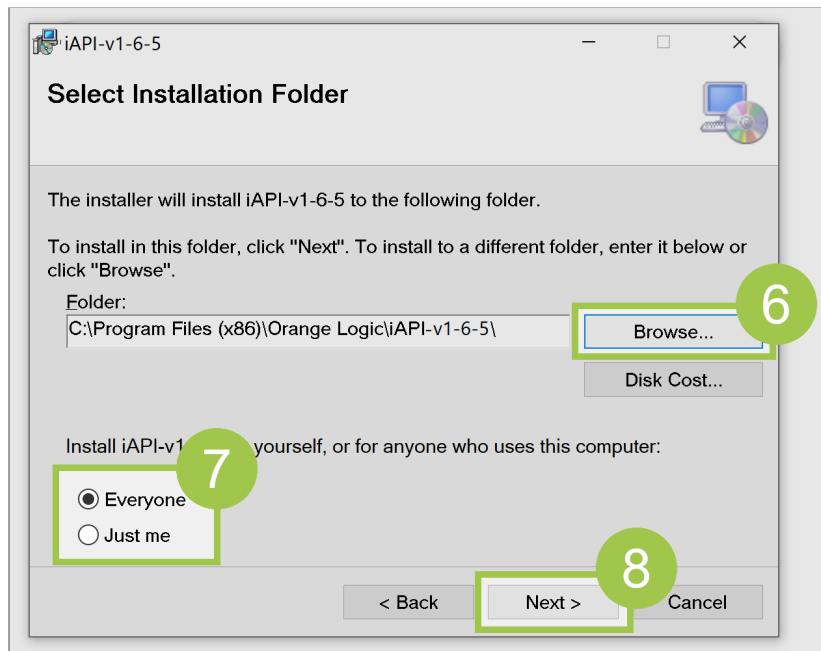
5. In this window, review the content and click **Next** to continue.



Next Button

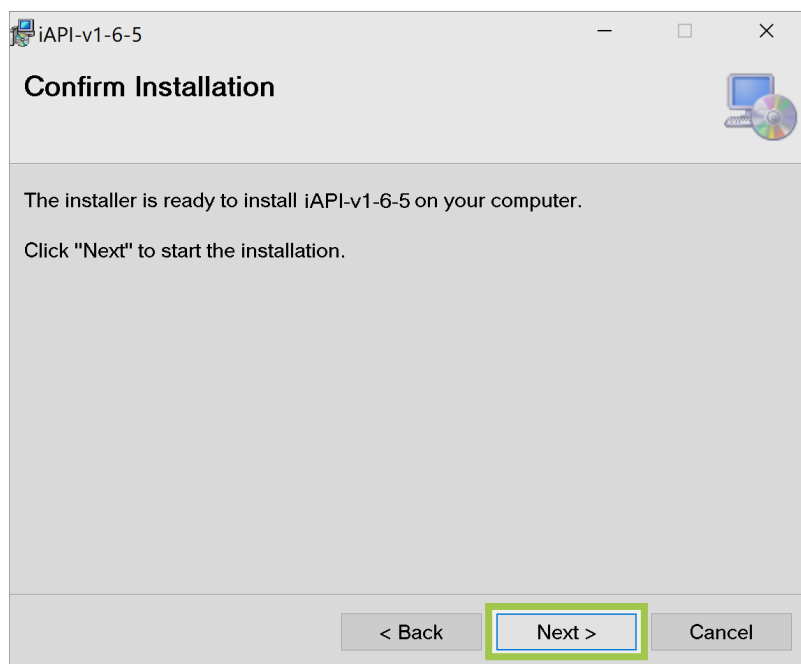
6. By default, the installer will install iAPI in the following path: **Program Files > Orange Logic > iAPI**.

7. Select **Everyone** or **Just Me** depending on who will be using iAPI on the computer you are installing the program on.
8. Click **Next** to continue.



Select Installation Folder

9. Click **Next** to confirm the installation. iAPI installs on your computer and is ready to use.



Confirm Installation

## CSV Template and General iAPI Tips

CSVs should follow the formats defined in [RFC 4180 - Common Format and MIME Type for Comma-Separated Values \(CSV\) Files](#). You must follow this [template](#) when you create your CSV.

Here are a few tips to keep in mind when using iAPI:

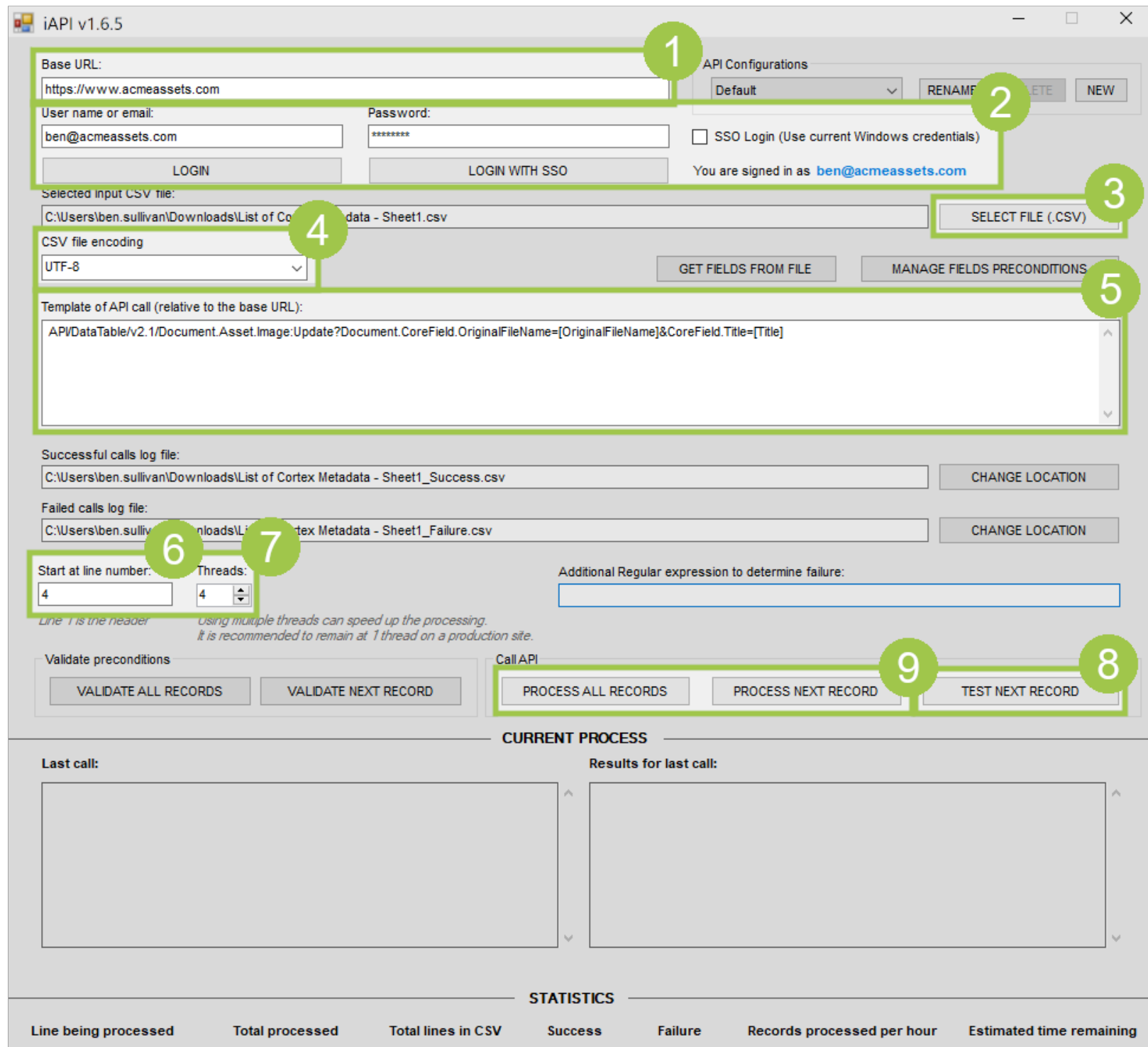
- When creating your API call, we recommend that you check the API field names so that they match in your CSV. To do this, you can use a ListFields call on your resource, such as `/API/DataTable/v2.2/Documents.Image.default:ListFields`.
- When your template API call is ready, you can perform a trial run in the browser using sample values. The response will be provided immediately, and if your call failed, the reason for failure will be displayed.
- When changing to another CSV, close and reopen iAPI before running the new CSV.
- Run your API call on each sub-type against the CSV to make sure you updated all assets. You can run the CSV with the call for the first sub-type, then run the Failure Log for the next sub-type, as these will be ones that did not match the call for the first sub-type. When doing this, it is helpful to change the title of the Success/Failure logs to reflect the document type for which you ran the call.
- When calling large batches, append the following criterion to the call: **&IndexingPriority=Low**. Since the calls can fire faster than the database can index them, this will prevent the queue from being overloaded in the database.
  - **&IndexInBackground=1**: This will skip pushing the assets to the search index inline and will speed up the API calls.
  - **IndexingPriority=Low**: This forces the document to be indexed in a low-priority queue to avoid impacting the indexing queue used by users on the site.

## Process a CSV File

This section describes how to process a CSV file. For more information about the fields in the iAPI window, go to [iAPI Window](#).

To process a CSV file:

1. Enter the URL to your organization's Cortex site in the **Base URL** field.
2. Log in to your Cortex site.
3. Click **Select File** to attach your CSV file.
4. Select the encoding format you want to use for your CSV file from the **CSV File Encoding** drop-down menu.
5. Enter the API call in the **Template of API Call (Relative to the Base URL)** field.
6. Enter the row number you want the API to process first in the **Start At Line Number** field. By default, the line is 2 because the line 1 is generally the header.
7. Select how many threads should run from the **Threads** field.
8. We recommend you test the call before processing the CSV file. Click **Test Next Record** in the **Call API** section to test the call. If the test is successful, process the record.
9. Choose one of the following options to process the CSV file:
  - o Click **Process All Records** to process the whole CSV file.
  - o Click **Process Next Record** to process one line at a time.



Process CSV File

## iAPI Window

When you open iAPI, you are presented with this window:

The screenshot shows the iAPI v1.6.5 application window. It features several sections for configuration and execution:

- Base URL:** A text input field for the organization's Cortex site URL.
- User name or email:** A text input field for login credentials.
- Password:** A text input field for login credentials.
- API Configurations:** A dropdown menu set to 'Default', with buttons for 'RENAME', 'DELETE', and 'NEW'. Below it is a checkbox for 'SSO Login (Use current Windows credentials)'.
- Selected Input CSV file:** A text input field with a 'SELECT FILE (.CSV)' button.
- CSV file encoding:** A dropdown menu set to 'UTF-8', with buttons for 'GET FIELDS FROM FILE' and 'MANAGE FIELDS PRECONDITIONS'.
- Template of API call (relative to the base URL):** A large text area for defining the API endpoint.
- Successful calls log file:** A text input field with a 'CHANGE LOCATION' button.
- Failed calls log file:** A text input field with a 'CHANGE LOCATION' button.
- Start at line number:** A text input field set to '2', with a note: 'Line 1 is the header'.
- Threads:** A spinner control set to '0', with a note: 'Using multiple threads can speed up the processing. It is recommended to remain at 1 thread on a production site.'
- Additional Regular expression to determine failure:** A text input field.
- Buttons:** A group of buttons for 'VALIDATE ALL RECORDS', 'VALIDATE NEXT RECORD', 'PROCESS ALL RECORDS', 'PROCESS NEXT RECORD', and 'TEST NEXT RECORD'.
- CURRENT PROCESS:** A section with two text areas: 'Last call:' and 'Results for last call:'.
- STATISTICS:** A table showing the current status of the process.

Line being processed	Total processed	Total lines in CSV	Success	Failure	Records processed per hour	Estimated time remaining
0	0	0	0	0	0	N/A

iAPI Window

## Base URL

Enter your organization's Cortex site in the **Base URL** field. This will allow iAPI to know where to ingest the CSV file. The URL must include the **https** prefix and the subdomain. If your organization's Cortex site does not have a subdomain, try using **www**. For example, if your organization's Cortex site is acmeassets.com, enter "https://www.acmeassets.com".

The image shows a close-up of the 'Base URL' field. The text 'https://www.acmeassets.com' is entered into the input box.

Base URL Field

## Login Options

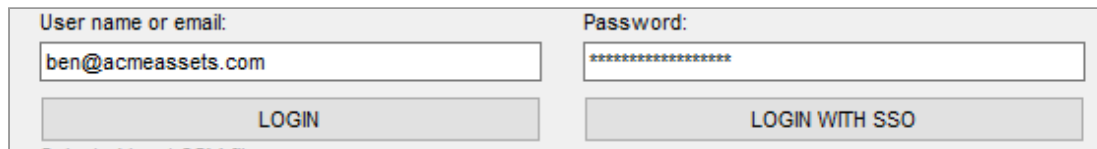
To make API calls and process CSV files, you must be logged in to Cortex. Your login and password in iAPI is the same as your credentials on your organization's Cortex site. There are three methods to log in to Cortex:

- [Log in with user name or email and password](#)
- [Log in with SSO](#)
- [Log in with Windows SSO credentials](#)

## Log In with User Name or Email and Password

To log in with your username and password:

1. Enter your user name in the **User Name or Email** field.
2. Enter your password in the **Password Field**.
3. Click **Login**.



The screenshot shows a login form with two input fields. The first field is labeled 'User name or email:' and contains the text 'ben@acmeassets.com'. The second field is labeled 'Password:' and contains a series of asterisks. Below the first field is a button labeled 'LOGIN'. Below the second field is a button labeled 'LOGIN WITH SSO'.

Log In With User Name and Password

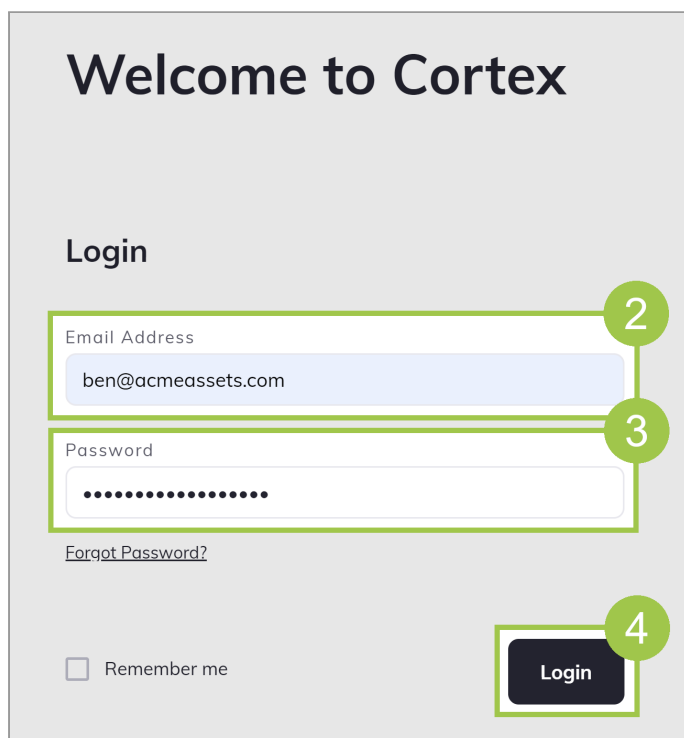
**Note:** If you are unable to log in, verify that you entered a secure link in the [Base URL](#) field by adding the prefix "https" in the URL.

## Log In With SSO

Use the **Login With SSO** button if your organization's Cortex site uses SSO to log in.

To log in with SSO:

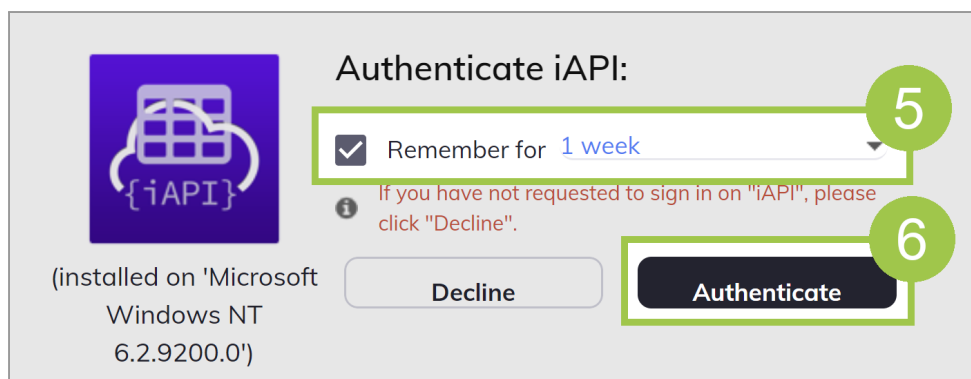
1. Click **Login With SSO**. The login page to your organization's Cortex site automatically displays in a new window.
2. In this window, enter your email address in the **Email Address** field.
3. Enter your password in the **Password** field.
4. Click **Login**. The **Authenticate iAPI** panel displays.



The screenshot shows a login page titled 'Welcome to Cortex'. Below the title is a 'Login' section. It contains an 'Email Address' field with 'ben@acmeassets.com' entered, a 'Password' field with asterisks, and a 'Login' button. There is also a 'Remember me' checkbox and a 'Forgot Password?' link. Numbered callouts 2, 3, and 4 are placed over the email field, password field, and login button respectively.

Sign In

5. By default, the **Remember For** checkbox is selected. You can select how long you want iAPI to be authenticated under your login credentials by selecting an option in the drop-down menu. You can choose from 1 day, 1 week, 1 month, 3 months, and 6 months. For iAPI to only authenticate the current session, deselect the checkbox.
6. Click **Authenticate** to authenticate your login credentials. **Note:** You must authenticate your login credentials within three minutes. Otherwise, the login will timeout.

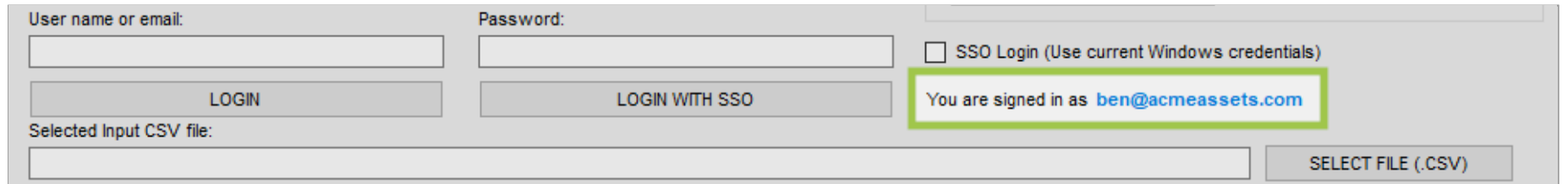


The screenshot shows the 'Authenticate iAPI' panel. It features a purple icon with '{iAPI}' text. Below the icon is the text '(installed on 'Microsoft Windows NT 6.2.9200.0')'. To the right is a dropdown menu with 'Remember for 1 week' selected. Below the dropdown is a message: 'If you have not requested to sign in on "iAPI", please click "Decline".'. At the bottom are two buttons: 'Decline' and 'Authenticate'. Numbered callouts 5 and 6 are placed over the dropdown menu and the 'Authenticate' button respectively.

Authenticate iAPI Panel

Once you have authenticated the login, your email displays in the iAPI window.

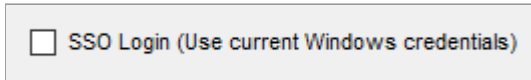




Email Displayed in iAPI Window

## SSO Login (Use Current Windows Credentials)

If you use SSO for your Windows computer and Cortex and those login credentials are the same, select the **SSO Login (Use Current Windows Credentials)** checkbox. The **User Name or Email** and **Password** fields autopopulate with your Windows SSO credentials.



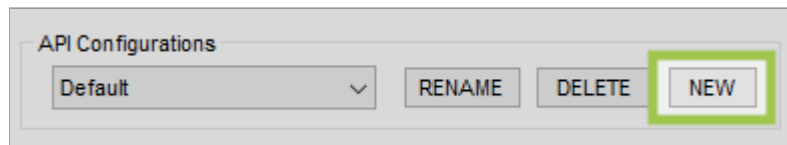
SSO Login (Use Current Windows Credentials) Checkbox

## API Configurations

The **API Configurations** section allows you to set up templates. This is helpful if you generally use the same API calls often.

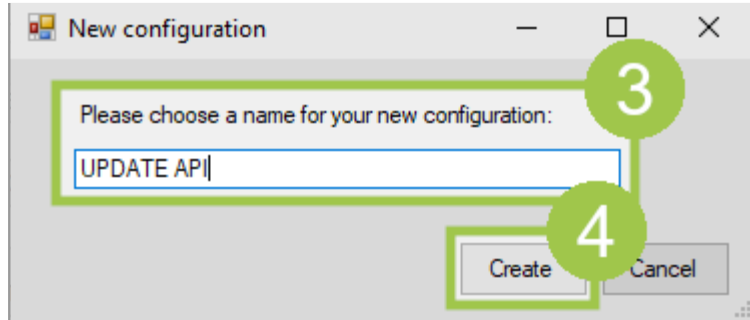
To create a template:

1. Set up the iAPI window with the information that you want to save. For example, if you commonly use the UPDATE API, enter the API call in the **Template of API Call (Relative to the Base URL)** field.
2. Click **New**.

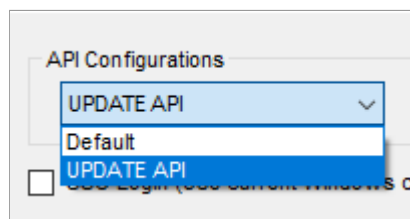


New Button

3. Enter a name for the template in the **New Configuration** window.
4. Click **Create**. The template is saved and can be found in the **API Configurations** drop-down menu.



New Configuration Window



API Configurations Drop-Down Menu

## Select Input CSV File

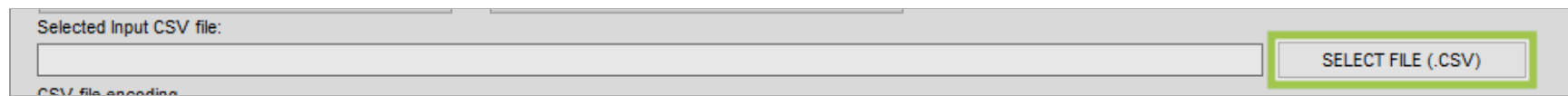
**Note:** You must use the correct quotation marks. iAPI supports the Unicode Quotation Mark ([code point U+0022](#)). It does not support the Unicode Right Double Quotation Mark (code point U-201D), which is also referred to as the “curly quotation mark”.

In the **Select Input CSV File** section, upload the CSV file that contains the data you want to ingest. The delimiters for the CSV file are:

- **Text Qualifier:** “ (quotation mark)
- **Field Separator:** , (comma)
- **Multi Select Field Separator:** | (pipe)
- **End of Line Character:** CR/LF
- **Header Rows:** Column Names - do not use special characters (!@#\$\$%^&\*)
- **Footer Rows:** none

To add the CSV file:

1. Click **Select File (CSV)**. A pop-up window displays.



Select File (CSV) Button

2. In this window, select the CSV file you want to upload and click **Open**. The name of the file displays in the field.



CSV File

## CSV File Encoding

The **CSV File Encoding** drop-down menu allows you to choose from these encoding methods:

- UTF-8
- ANSI (Your Machine's ANSI Encoding)
- ANSI (Windows Western)

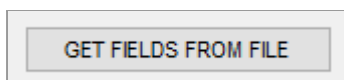
The encoding method you select here must match the encoding method of your CSV file. Otherwise, the imported content may not transfer well. For example, foreign characters may end up displaying as symbols. If this occurs, re-process the CSV file with a different encoding method. For example, if you processed a file with ANSI (Windows Western) and the results did not match the CSV file, then re-process the CSV file with UTF-8.

Some spreadsheet applications allow you to select the encoding method when you save the file as a CSV. However, there are some applications that do not allow you to select a method. At the time of publication, the following are common spreadsheet applications and their encoding methods:

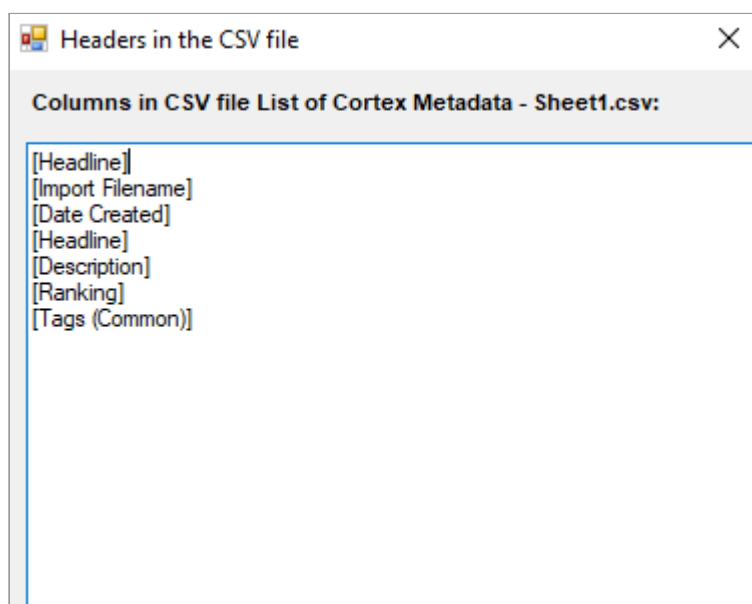
- **Google Docs:** UTF-8
- **Microsoft Excel:** UTF-8 for Microsoft Excel 2014 and later. ANSI for Microsoft Excel 2013 and earlier.

## Get Fields From File

The **Get Fields From File** button opens the **Headers In the CSV File** window which displays all the column names from the CSV file. Use this button to verify that iAPI recognizes all the column names in the CSV file.



Get Fields From File Button



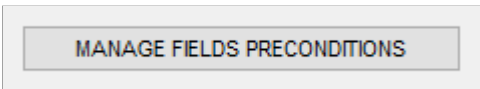
Headers In the CSV File Window

## Manage Fields Preconditions

The **Manage Fields Preconditions** button allows you to add preconditions for each CSV field name to follow. For example, you can add a precondition for the "Title" field to only be imported if the maximum length is 250 characters.

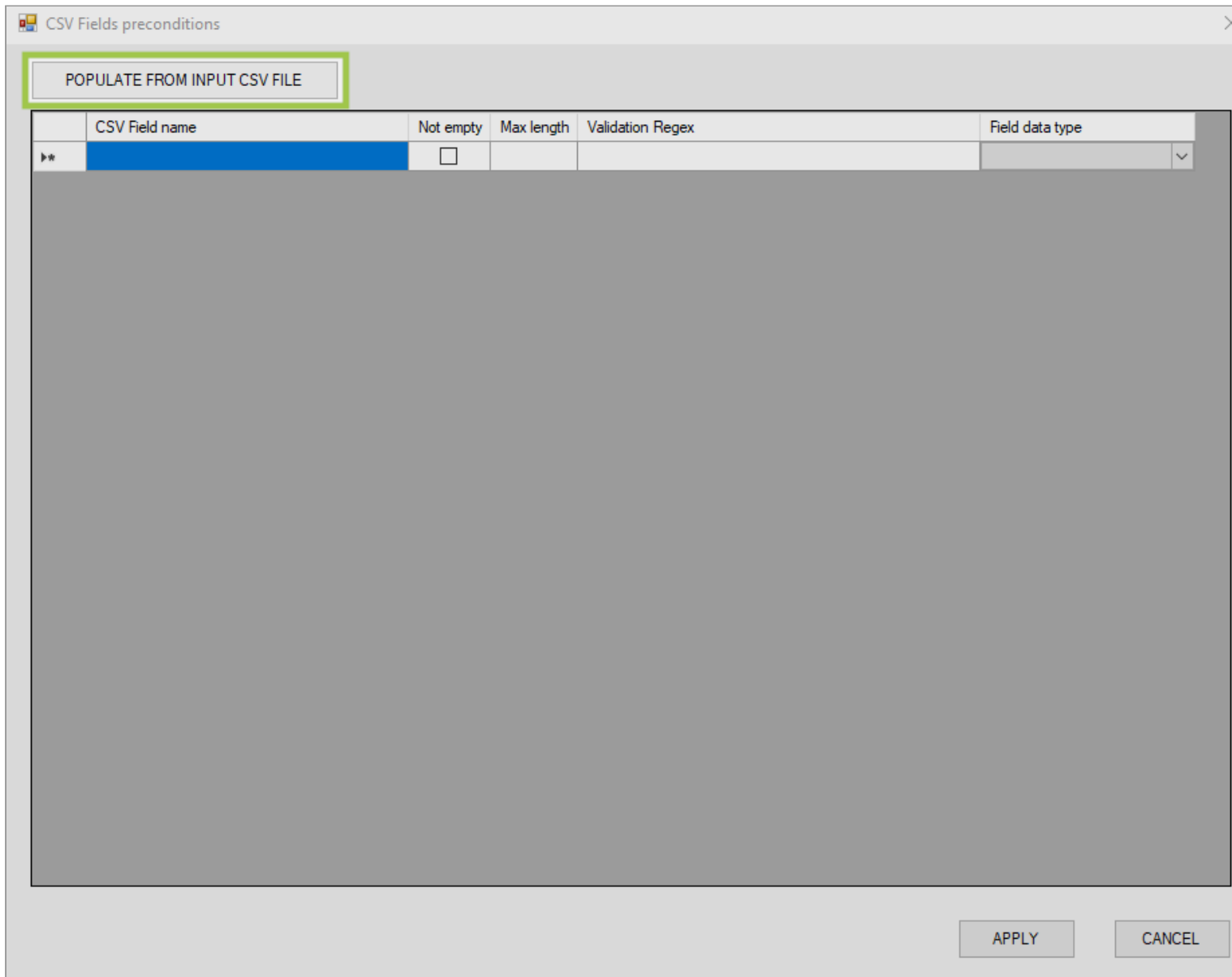
To add preconditions:

1. Click **Manage Fields Preconditions**. The **CSV Fields Preconditions** window displays.



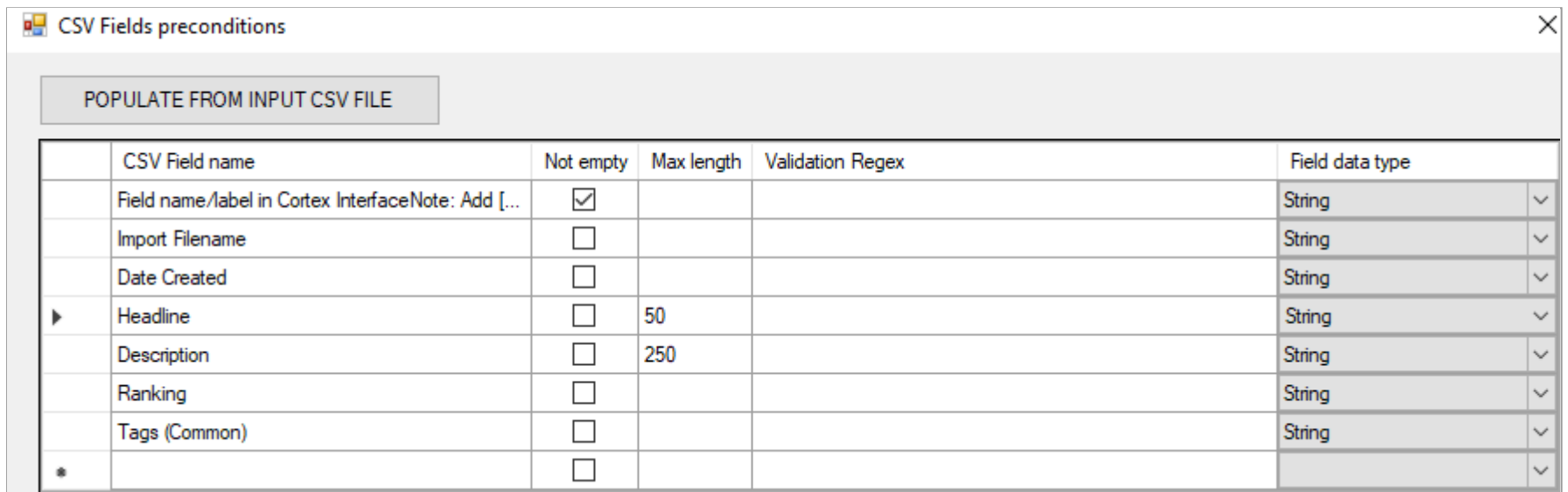
Manage Fields Preconditions Button

- In this window, click **Populate From Input CSV File** to display the CSV Field names.



Populate From Input CSV File Button in CSV Fields Preconditions Window

- Add the conditions in the [CSV Fields Preconditions window](#).
- Close the window to save your conditions.



CSV Fields Preconditions Window

### CSV Fields Preconditions Window

The following table describes the columns that display in the CSV Fields Preconditions window:

Column Name	Description
CSV Field Name	Displays the name of the field in the CSV file. All conditions added within this row will be applied to this field.
Not Empty	If selected, iAPI will only process the field if it is not empty. If deselected, iAPI will process the field, even if it is empty.
Max Length	The maximum number of characters allowed for that field. If a number is entered, iAPI will only process the field if

	<p>the number of characters is less than the value added here.</p> <p>If this is blank, the number of characters will not be taken into account.</p>
Validation Regex	<p>A Regex formula that each row should follow. If a formula is entered, iAPI will only process the row if it follows this formula.</p> <p>If this is blank, a formula will not be taken into account.</p>
Field Data Type	<p>The type of data in the field. The options are:</p> <ul style="list-style-type: none"> <li>• String</li> <li>• Integer</li> <li>• Float</li> </ul>

## Template of API Call (Relative to the Base URL)

Enter the API call in the **Template of API Call (Relative to the Base URL)** field. API calls used here should follow the DataTable API syntax. For more information, see [Orange Logic - DataTable APIs v2.1](#) or [Orange Logic - DataTable APIs v2.2](#).

Template of API call (relative to the base URL):

API/V2.1/DataTable/Document.Asset.Video:Update?&Document.CoreField.Title:=[Title]

Template of API Call (Relative to the Base URL) Field

The types of API calls that can be used are:

- Update
- Create
- CreateorUpdate
- Delete

## DataTable API Calls

The following table displays example API calls based on the Update DataTable call: **API/V2.1/DataTable/Document.Asset.Video:Update?**. This table also includes the associated Cortex field that the metadata will be ingested to.

API Call	Cortex Field
Document.CoreField.OriginalFileName=[Original File name]	Document.CoreField.OriginalFileName
&Document.CoreField.Title:=[Title]	Document.CoreField.Title
&Document.CoreField.captionlong_2:=[Alternate Description]	Document.CoreField.captionlong_2
&Document.CoreField.CaptionLong:=[Description]	Document.CoreField.CaptionLong
&Document.Tags.Topic++=[Topic]	Document.Tags.Topic
&Document.Tags.RegionOffice++=[Region/Office]	Document.Tags.RegionOffice
&Document.Tags.Keyword++=[keywords]	Document.Tags.Keyword++=[keywords]

## List of Fields for DataTable API Calls

To view a list of all fields used in video assets for DataTable, use:

[https://www.\[SITENAME\]/API/V2.1/DataTable/Document.Asset.Video>ListFields](https://www.[SITENAME]/API/V2.1/DataTable/Document.Asset.Video>ListFields)

To view a list of all fields used in image assets for DataTable, use:

[https://www.\[SITENAME\]/API/V2.1/DataTable/Document.Asset.Image>ListFields](https://www.[SITENAME]/API/V2.1/DataTable/Document.Asset.Image>ListFields)

To view a list of all DataTable resources, use:

[https://www.\[SITENAME\]/API/Datatable/v2.2](https://www.[SITENAME]/API/Datatable/v2.2)

## Assign or Remove Multiple Values in a Multivalued Field

The operator for assigning a value to a single value field is: = (equals sign). To assign or remove multiple values in a multivalued field, the operators are:

- **Add a value to the field: +=**
- **Add a value to the field and create a field if it does not exist in the reference table: ++=**
- **Remove a value from the field: -=**
- **Remove all values from the field: --=**

## Successful and Failed Calls Log File

The **Successful Calls Log File** displays the path to the log file in which successful API calls are automatically logged.

The **Failed Calls Log File** displays the path to the log file in which failed API calls are automatically logged. When a call fails, the Failure Log provides information on why the call has failed, helping you in troubleshooting the problem with your call. Make the necessary changes in the CSV and try again.

You can change the location for either of these files by clicking **Change Location**.

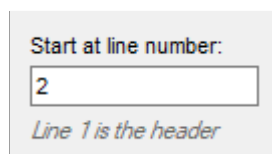


The screenshot shows two input fields for log file paths. The first field is labeled "Successful calls log file:" and contains the path "C:\Users\ben.sullivan\Downloads>List of Cortex Metadata - Sheet1\_Success.csv". To its right is a button labeled "CHANGE LOCATION". The second field is labeled "Failed calls log file:" and contains the path "C:\Users\ben.sullivan\Downloads>List of Cortex Metadata - Sheet1\_Failure.csv". To its right is another button labeled "CHANGE LOCATION".

Successful and Failed Calls Log File Fields

## Start at Line Number

The first line is the header of the CSV file. Select which row in the CSV file you want the API call to start with in the **Start at Line Number** field.

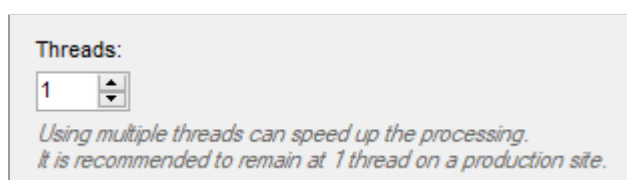


The screenshot shows a text input field labeled "Start at line number:" with the value "2" entered. Below the field is a note: "Line 1 is the header".

Start at Line Number

## Threads

Enter the number of threads that should run simultaneously in the **Threads** field. You can run up to four threads at once. Using threads is dynamic to your computer's processor. Using multiple threads can speed up the calls, however, this can impact performance if there are many users in Cortex.

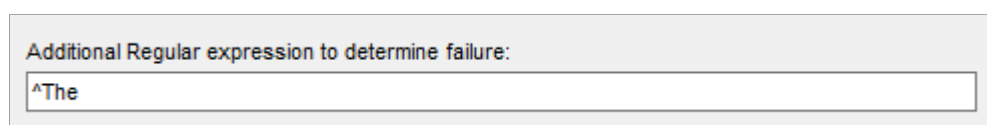


The screenshot shows a dropdown menu labeled "Threads:" with the value "1" selected. Below the dropdown is a note: "Using multiple threads can speed up the processing. It is recommended to remain at 1 thread on a production site."

Threads Field

## Additional Regular Expressions to Determine Failure

The **Additional Regular Expressions to Determine Failure** field allows you to enter a Regex formula to search for a particular pattern while processing the call. If the call locates that pattern, then ultimately, the processing will be considered a failure regardless of a successful API call or HTTP code.



The screenshot shows a text input field labeled "Additional Regular expression to determine failure:" with the value "^The" entered.

Additional Regular Expressions to Determine Failure Field

## Validate Preconditions

If you specified preconditions in the [Manage Fields Preconditions](#) section, you can validate those preconditions. The **Validate Preconditions** section contains these buttons:

- **Validate All Records:** Click this button to validate all records simultaneously.
- **Validate Next Record:** Click this button to validate one record at a time.

You can view the status of the validation in the [Current Process](#) and [Statistics](#) sections.

## Call API

The **Call API** section allows you to run the API call with these buttons:

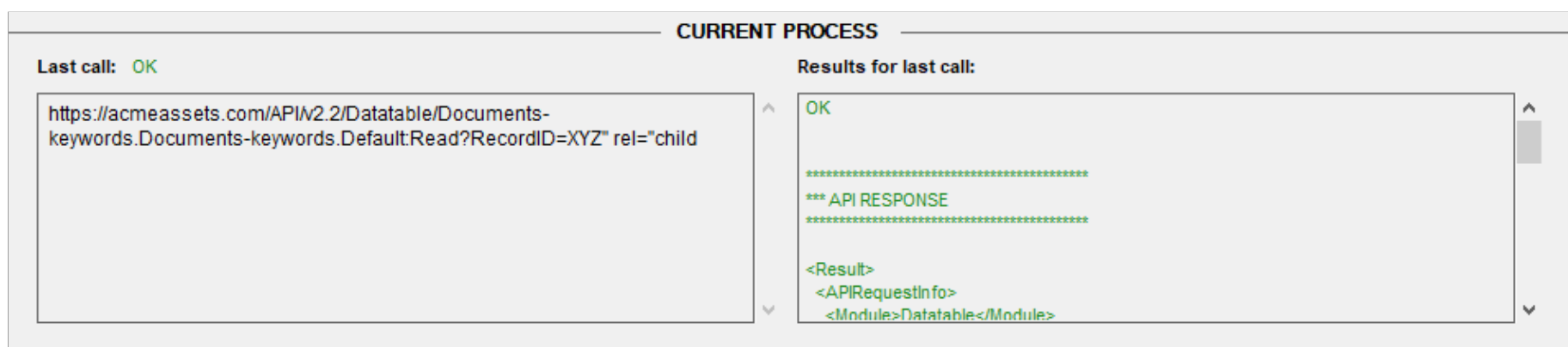
- **Process All Records:** Click this button to process all records simultaneously.
- **Process Next Record:** Click this button to process one record at a time.
- **Test Next Record:** Click this button to test one record at a time before processing the call. This allows you to identify any errors without processing the line and inserting values. When an API is run in Test Mode, the changes are applied and then rolled back immediately. We recommended you test your calls before processing any records. If you receive the “The input API is not available in test mode” message, go [here](#).

## Current Process

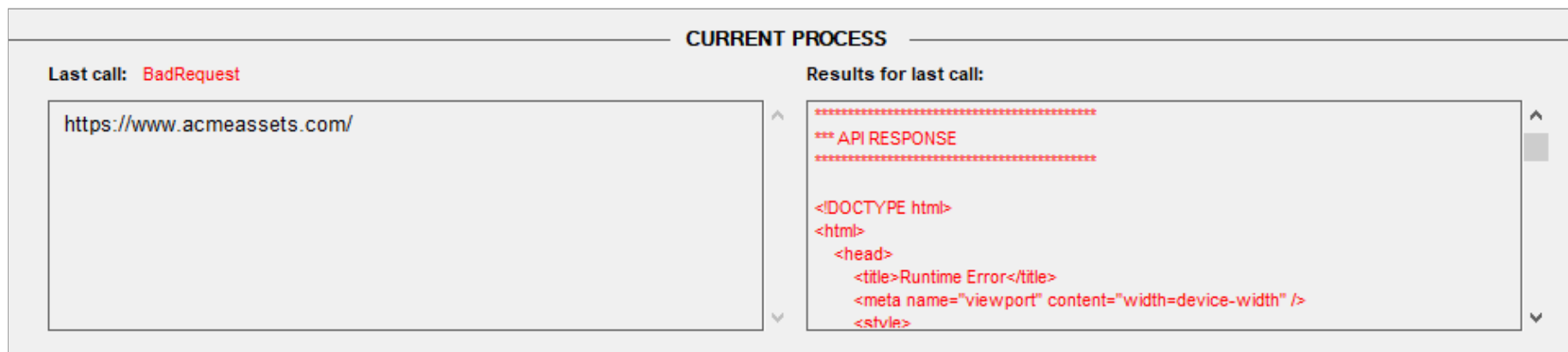
The **Current Process** section is split into two panels:

- **Last Call:** Displays information on the calls that are currently being processed. You can copy the call from this window and run it directly in your web browser. This is useful to more easily see the call details, including values populated and error details.
- **Results For Last Call:** Displays the results of the last processed call. You can copy and paste this content in a text document. This allows you to easily search for errors.

Successful calls display in green and failed calls display in red.



Successful Call



Failed Call

## Statistics

The **Statistics** section displays the following information on calls that are currently being processed and calls that have already been processed:

- **Line Being Processed:** The current row that is being processed.
- **Total Processed:** The number of rows that have been processed.
- **Total Lines in CSV:** The total number of rows that need to be processed.
- **Success:** The number of rows that were successfully processed.
- **Failure:** The number of rows that failed to process.
- **Records Processed Per Hour:** The average number of records that have been processed per hour.
- **Estimated Time Remaining:** The estimated time remaining for the process to complete. This is calculated by checking how long it is taking to process one API call, and multiplying that by the number of CSV rows remaining to process.

## Factors That Impact the Speed of API Calls

There are multiple factors that impact the speed of API calls with iAPI:

- **Field Type:** Writing a CoreField is faster than writing a Custom Field because Core Fields are automatically indexed and Custom Fields are not. For example: `Update?CoreField.ID-Client=123&CoreField.Legacy-ID:=456` is faster than `Update?CoreField.ID-Client=123&CustomField.Legacy-ID:=456`.
- **Server:** For example, servers that run few tasks have a higher speed than those that run lots of tasks simultaneously.
- **The call itself:** For example, calls that read data have a higher speed than calls that re-write data.
- **The internet speed:** This is not a key factor. The call will not necessarily run faster on a machine with high-speed internet because the other factors dictate limitations on the internet speed.

When launching large batches on Production sites, append the following criterion to the call: **&IndexingPriority=Low**. This will prevent the queue from being overloaded in the database since the calls can fire faster than the database can index them.

**Note:** Appending **&IndexInBackground=1** will skip pushing the assets to the search index inline and will speed up the API calls. Appending **&IndexingPriority=Low** forces the document to be indexed in a low-priority queue to avoid impacting the indexing queue used by users logged in to Cortex.

## Run Multiple Instances of iAPI

Running multiple instances of iAPI allows for simultaneous processing of large numbers of API calls. For example, you may need to run multiple instances to run millions of API calls to update assets.

To run multiple instances of iAPI, duplicate the folder that contains App\_iAPI (application) and App\_iAPI.exe (configuration file).

### Example: Duplicating a Folder

Original folder that contains App\_iAPI and App\_iAPI.exe: **Orange Logic > iAPI-v1-4-2**

Copy of the folder that contains App\_iAPI and App\_iAPI.exe: **Orange Logic > iAPI-v1-4-2**

## Enable Automated Emails With API

If you are using API calls to create accounts using a CSV, by default, the Events that are generated by these calls will not send email notifications. Add **&AllowNotifications=1** in the API call to enable emails.

### Example: Create New Accounts by API

Let's say you want to create new accounts by API. The **Administrator Created a New Contact** Event Type will be triggered and logged; however, Cortex will not send an email notification to the new contacts. Enable email notifications by adding "**&AllowNotifications=1**" to the API call.

Sample call:

```
API/Datatable/v2.1/Document.Asset.Image:Update?Document.CoreField.Identifier=IMAGEID1&Document.CoreField.DocMark:=I&AllowNotifications=1
```

## Accept Terms & Conditions or Privacy Notice with API

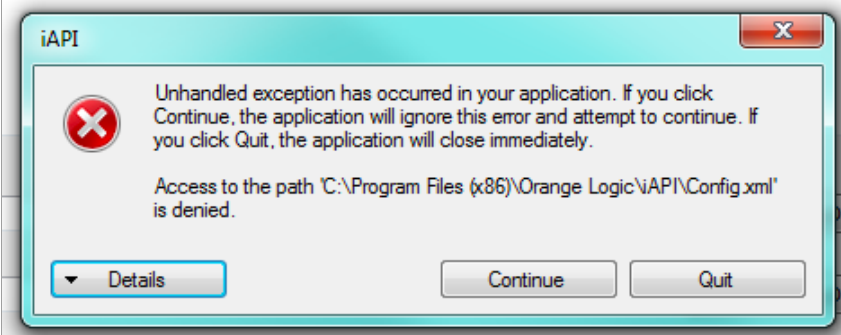
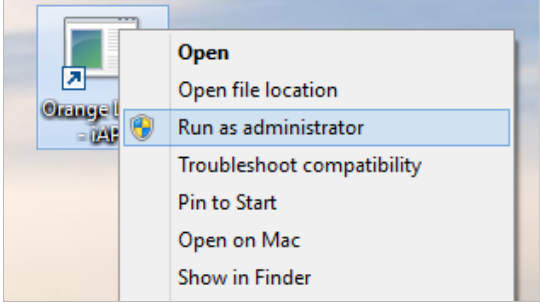
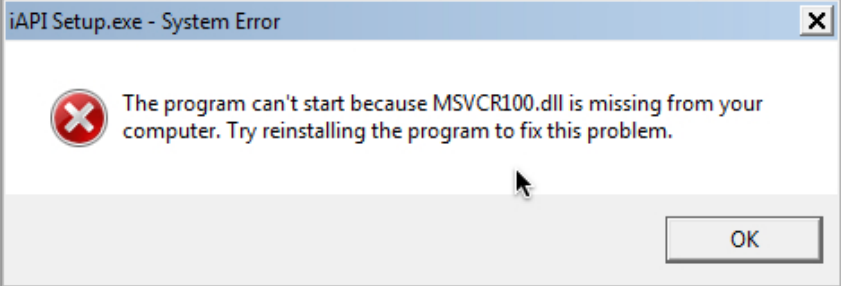
You can require users to accept the Terms & Conditions or Privacy Notices with API the next time they login. For example, if the Privacy Policy was updated, you can require users to accept the new policy.

To require users to accept the Terms & Conditions or Privacy Notice the next time they log in:

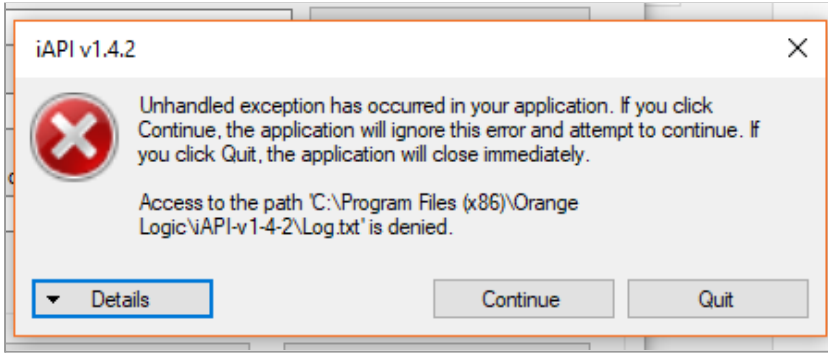
1. Export a CSV file containing all users.
2. Do one of the following :
  - Use iAPI to automatically deselect the **Consent Privacy Notice** checkbox with the following template API: `API/Datatable/v2.1/Contact.Client:Update?Contact.CoreField.Email1=[Email address]&Contact.CoreField.ConsentPA:=0`. In this API, "Email Address" is the name of the column in the CSV file.
  - Use iAPI to automatically deselect the **Terms & Conditions** checkbox with the following template API: `Terms and Conditions'` with `Contact.CoreField.ConsentTC:=0`.

# Troubleshooting

The following table displays common problems and their solutions.

Problem / Error Message	Solution
<p>“Access to the path ‘C:\Program Files (x86)\Orange Logic\iAPI\Config.xml’ is denied”</p>  <p>“Access to the Path” Error Message</p>	<p>iAPI requires Administrator rights in order to create a config.xml file. If you are not running iAPI as an Administrator, you will see this error message.</p> <p>If your Windows user account is not an Administrator account, you must use the “Run as administrator” command. To do this, right-click the iAPI icon and select “Run as administrator.”</p>  <p>Run as Administrator</p>
<p>MSVCR100.dll missing</p>  <p>“MSVCR100.dll Missing” Error Message</p>	<p>You are missing a Microsoft Visual C++ Redistributable package. The latest versions can be downloaded from the <a href="#">Microsoft Download Center</a>. Install it, and relaunch iAPI.</p>
<p>HTTP status “Bad Request”</p>	<p>Check the column “API Result” (last column to the right in the Failure CSV). This gives the full call interpretation, listing Errors in the call and reasons.</p> <p>For example:</p> <p><b>Operator used: :=</b>  <b>Operator Description:</b> Assign a value to a single-value field  <b>Error:</b> The given operator is not compatible with a multivalued field. Instead, use multivalued operators (+=, +=, -=, --=)</p> <p><b>Operator used: +=</b>  <b>Operator Description:</b> Add a value or a list of values (separated by  ) to a multivalued field.  <b>Error:</b> The requested value was not found in the authority list and you did not request to create it. Instead, use this operator +=.</p>
<p>All calls are in the Success log, but records were not created on the site.</p>	<p>Check the Base URL. Use the full URL with https:// and www.</p>
<p>“Unhandled exception has occurred in your application. If you click Continue, the application will ignore the error and attempt to continue. If you click Quit, the application will close immediately.”</p>	<p>This is a known issue in iAPI v1.4.2. Uninstall the current application and install to the latest iAPI version.</p>





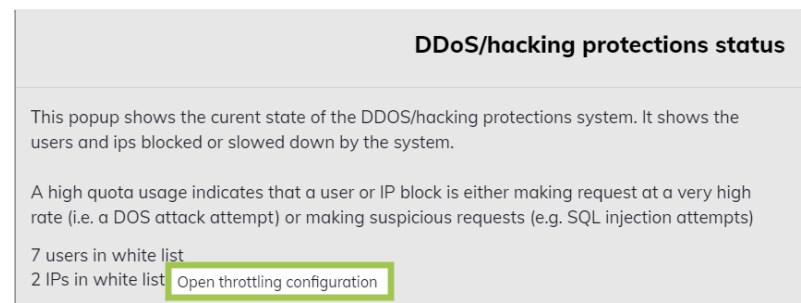
"Unhandled Exception" Error Message

509 Error

Your session may be blocked due to the volume of API calls you have made. Cortex sometimes interprets large volumes of API calls as a Distributed Denial of Service (DDoS) attack and blocks or throttles the calls as a defense. Whitelisting the user prevents Cortex from blocking or throttling the user.

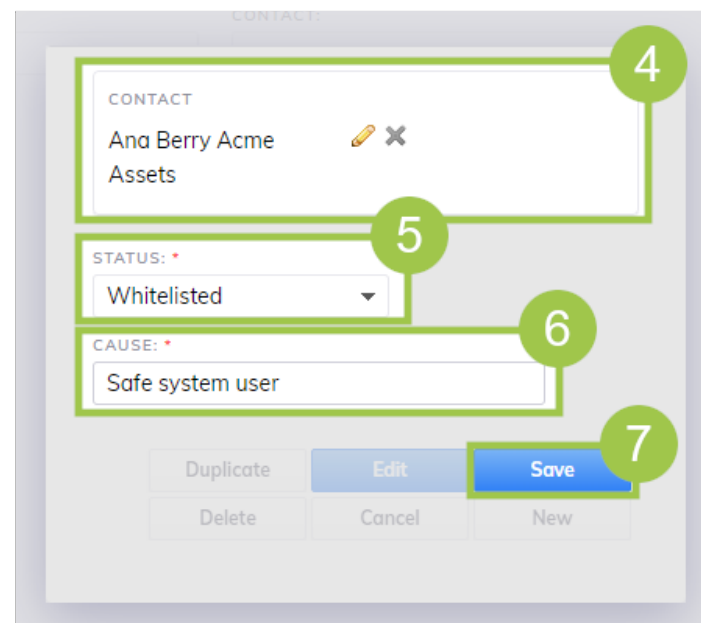
To whitelist a user:

1. Go to **Cortex Administration > Maintenance > DDoS/Hacking Protection Status**.
2. Click **Open Throttling Configuration**. A new browser tab opens.



Open Throttling Configuration

3. In this tab, click **New**.
4. Enter the **IP Address** or the **Contact**.
5. In the **Status** drop-down menu, select **Whitelisted**.
6. In the **Cause** field, enter the reason for whitelisting the user or IP address.
7. Click **Save**. The user or IP address is added to the whitelist and will not be blocked from Cortex.



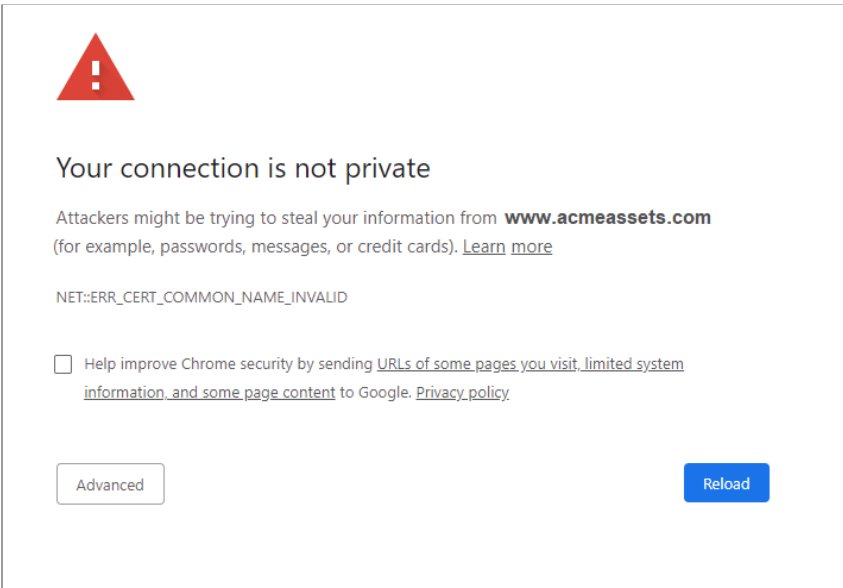
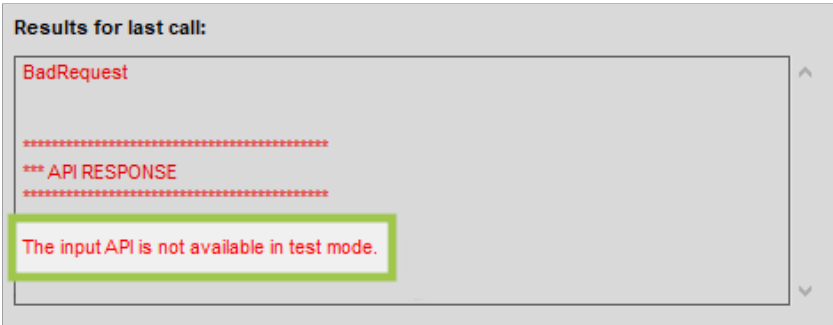
Whitelist User or Contact

Tags are not imported as separate tags, even though they are comma-separated.

Commas and semicolons are not supported. Tags must be pipe delimited (|).

Incorrect:

- cone, dessert, ice cream, treat, waffle
- cone; dessert; ice cream; treat; waffle

	<p>Correct:</p> <ul style="list-style-type: none"> <li>• cone   dessert   ice cream   treat   waffle</li> </ul>
<p>Special characters (!@#\$\$%^&amp;*) are not rendered properly.</p>	<p>Ensure that you are using the latest iAPI version and that the encoding method you selected in iAPI (UTF-8, ANSI) matches the encoding of the CSV file.</p>
<p>My API call has a sub-call and it is failing.</p>	<p>Sub-calls can only use the READ function. Test your sub-call individually before adding it to the API call. If it is successful, there is an issue with the API call itself.</p>
<p>My API calls are processing very slowly.</p>	<p>Ensure that you are whitelisted in Cortex. See the solution for "<a href="#">509 Error</a>" for the procedure on how to whitelist a user.</p> <p>Some calls can take longer to process than others. For example, CREATE calls take longer to process than UPDATE. Likewise, running an UPDATE on CoreFields will process faster than running an UPDATE on custom fields.</p>
<p>"Connection is not private" error.</p>  <p>Privacy Error</p>	<p>This can occur if iAPI has been open for several hours and you try to log in with SSO. Close iAPI and open the application again.</p>
<p>I have two columns in a legacy data CSV file that are mapped to Tags (CoreField.Keywords). I ran the API call and only one column of Tags was imported into Cortex.</p>	<p>It is not possible to run one API call with two different mappings to a particular target field in Cortex. Instead, run one call with the first mapping to that field, and then run a second call with the other mapping to that field.</p> <p>For example, run the first call with the CSV column "Subject" mapping to CoreField.Keywords. Then, run a second call with the CSV column "Tags" mapping to CoreField.Keywords.</p>
<p>My call was successful, but my field populated with "[column header]".</p>	<p>Make sure that the CSV you are running contains that column header. If not, iAPI will populate "[column header]" as the value. This can happen if you are running several different CSVs with the same call, and there is some inconsistency in the column headers.</p>
<p>"The input API is not available in test mode."</p>  <p>"The Input API Is Not Available in Test Mode" Message</p>	<p>This message displays when the called API is not available in Test Mode. Test Mode is only applicable for DataTable APIs. If this message displays and you are calling a DataTable API, swap the API version and name in the call. For example, your call should look similar to this after you swap the API version and name: <code>/API/DataTable/V2.1</code>.</p>